

**July 2018**

# Datex

# FootPrint WMS

## Silverlight ePortal User Manual



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# Silverlight ePortal

The FootPrint Silverlight ePortal provides basic access to information about your Warehouse, as well as an interface for submitting Orders. Primarily intended for use by customers, the ePortal is accessible from anywhere with internet access.

## Silverlight ePortal

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# ePortal User System Requirements

## Sections

- [General Requirements](#)

Before users are able to access FootPrint ePortal, they will need to make sure their systems meet the following requirements.

## General Requirements

- FootPrint ePortal functions using **Microsoft Silverlight**. In order to access the ePortal, users will need to have the Silverlight Plugin installed in their web browser.
- Ensure the time between the local machine and ePortal server isn't offset by more than **5 minutes**. If it is, the user authentication will fail.
- Ensure users are allowed to access the following ports of the ePortal site:
  - 443
  - 8879

## Supported Browsers

The following browsers support Microsoft Silverlight.

### Microsoft Windows

- Internet Explorer 7 or later
- Mozilla Firefox 3 or later

### Mac OS X

- Safari
- Mozilla Firefox 3 or later

# ePortal New Order

## Sections

- [Overview](#)
- [Main Screen Layout](#)
- [Order Header](#)
- [Order Lines](#)

## Overview

The ePortal New Order tab allows the user to create a new Order, using the existing information in FootPrint. This screen serves a similar function to both the [Create Inbound Order](#) and [Create Outbound Order](#) sections.

## Main Screen Layout

Line	Material	Material Name	Packaging	Quantity	Available	Remaining	Status	Vendo	Lot	Shipm	Notes
0											
1	Material 1		Case	1,674.00	1,659.00						
2	Material 3		Pallet	23.00	22.00						

The New Order tab is divided into two parts:

### 1. Order Header

Allows the user to enter basic Order information, and includes a Save button to submit the Order.

### 2. Order Lines

Allows the user to specify which items will be included in the Order.

## Order Header

The screenshot shows a web form titled 'Order Header'. It has a 'Save' button at the top left. The form is organized into several sections:
 

- Order Number:** A text field containing '1195'.
- Account:** A text field containing 'Wal-Mart 6404' with a search icon and a '+' button.
- Owner Reference:** An empty text field.
- Order Class:** A dropdown menu with 'Sales Order' selected.
- Contact:** A text field with a search icon and a '+' button.
- Vendor Reference:** An empty text field.
- Owner:** A dropdown menu with 'Datex Corp.' selected.
- Attention:** An empty text field.
- OrderNotes:** A large text area.
- Project:** A dropdown menu with 'Datex Corp.' selected.
- Address Line 1:** An empty text field.
- Address Line 2:** An empty text field.
- Last Modified On:** An empty text field.
- Carrier:** A dropdown menu.
- City:** An empty text field.
- State:** An empty text field.
- Last Modified By:** An empty text field.
- Service Type:** A dropdown menu.
- Country:** An empty text field.
- Postal Code:** An empty text field.
- Expected Date:** A date field with a calendar icon and the format '<M/d/yyyy>'.
- Status:** A dropdown menu with 'Created' selected.

Here the user enters specific information about the Order they are creating, referencing existing information in FootPrint, or adding new information to the system.

### Order Header Information

- Order Number.:** The LookUp number associated with the Order. The system will generate one, but the user can overwrite it.
- Order Class:** The user must select an Order Class from a drop-down list. The chosen Order Class will determine whether this is an Inbound or Outbound Order.
- Owner:** A drop-down list of all the Owners available to the user.
- Project:** A drop-down list of all the Projects available to the user.
- Carrier:** A drop-down list of all the Carriers available to the user.
- Service Type:** A drop-down list of all the Service Types available to the chosen Carrier.
- Status:** The Status of your Order. This is a system-generated field.
- Account:** The Name of the Account to be associated with this Order. The user can select an existing Account by opening the Select Account pop-up window, or create a new Account.
- Contact:** The Contact for the Account to be associated with this Order. The user can select an existing Contact by opening the Select Contact pop-up window, or create a new Contact.
- Address Line 1:** The Contact's address.
- Address Line 2:** The Contact's address continued.
- City:** The Contact's city.
- State:** The Contact's state.
- Country:** The Contact's country.
- Postal Code:** The Contact's zip or postal code.

- Owner** An open field for Owner related Reference information.
- Reference:**
- Vendor** An open field for Vendor related Reference information.
- Reference:**
- Order Notes:** An open field for notes or extra information.
- Last Modified On:** A system-generated field, indicating when this Order was last edited.
- Last Modified By:** A system-generated field, indicating who last edited this Order.
- Expected Date:** The Expected Date of the Order's shipment, arrival, or completion.

**\*Those in red are required fields.**

The **Save** button submits the Order, creating a new Order of the specified Order Class in FootPrint.

Accounts and Contacts can be selected using the "... " button, or created using the "+" button.

## Select Account Pop-Up Windows

Lookup Code	Name	Account Type	Notes
6404	Wal-Mart 6404	Customer	
3100	Fred Meyer	Customer	
2500	Perdue	Customer	
5400	Tyson	Customer	
4700	SaveOn	Customer	
Store 1	Walgreens	Customer	
SF23	Safeway	Customer	
297	International Market	Customer	

The **Account Name**, **Account Lookup Code**, and **Account Type** fields can be used to filter the displayed Accounts.

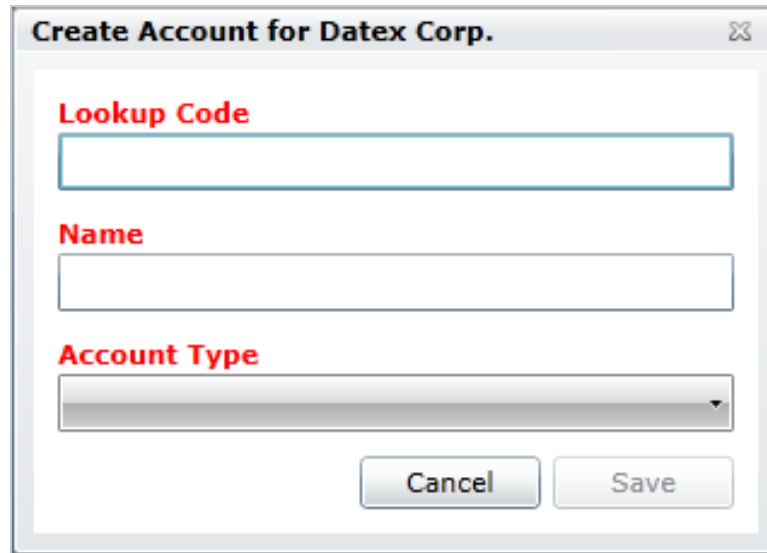
**LookUp Code:** The LookUp Code for the Account.

**Name:** The Name of the Account.

**Account Type:** The Type of Account.

**Notes:** Any Notes in the system for the Account.

## Create Account Pop-Up Windows

A screenshot of a 'Create Account for Datex Corp.' pop-up window. The window has a title bar with the text 'Create Account for Datex Corp.' and a close button. Inside the window, there are three input fields: 'Lookup Code', 'Name', and 'Account Type'. The labels 'Lookup Code', 'Name', and 'Account Type' are in red text. The 'Lookup Code' and 'Name' fields are text boxes, and the 'Account Type' field is a dropdown menu. At the bottom right of the window, there are two buttons: 'Cancel' and 'Save'.

The **Account Name**, **Account Lookup Code**, and **Account Type** fields can be used to filter the displayed Accounts.

**LookUp Code:** The LookUp Code for the Account.

**Name:** The Name of the Account.

**Account Type:** The Type of Account.

**Notes:** Any Notes in the system for the Account.

**\*Those in red are required fields.**

## Select Contact Pop-Up Windows



Lookup Code	Last Name	First Name	Attention	Line1
			Operations	1 Way Product Street

The **Lookup Code**, **Last Name**, and **First Name** fields can be used to filter the displayed Contacts.

**LookUp Code:** The LookUp Code for the Contact.

**Last Name:** The Contact's Last Name.

**First Name:** The First Name of the Contact.

**Attention:** The Attention Line for the Contact.

**Line 1:** The first Address Line for the Contact.

**Line 2:** The second Address Line for the Contact.

**City:** The Contact's City.

**State:** The Contact's State.

**Postal Code:** The Contact's ZIP or postal code.

**Country:** The Contact's Country.

## Create Contact Pop-Up Windows



The image shows a dialog box titled "Create Contact for Wal-Mart 6404". It contains several input fields for contact information. The fields are: "Lookup Code" (a single line), "First Name" and "Last Name" (two separate lines), "Attention Of" (a single line), "Line 1" and "Line 2" (two separate lines for address), "City" (a single line), and "State", "Postal Code", and "Country" (three separate lines). At the bottom right, there are "Cancel" and "Save" buttons. The labels for "Lookup Code", "First Name", "Last Name", "Line 1", "City", "State", "Postal Code", and "Country" are in red text, indicating they are required fields.

**LookUp Code:** A LookUp Code for the Contact, for your own Reference.

**First Name:** The Contact's First Name.

**Last Name:** The Contact's Last Name.

**Attention:** The Attention Line for the Contact.

**Line 1:** The first Address Line for the Contact.

**Line 2:** The second Address Line for the Contact.

**City:** The Contact's City.

**State:** The Contact's State.

**Postal Code:** The Contact's ZIP Code.

**Country:** The Contact's Country.

**\*Those in red are required fields.**

## Order Lines

Here the user specifies the items to be included in the Order they are creating, referencing existing Material information in FootPrint.

### Order Information

	Line	Material	Material Name	Packaging
	0			
▶	1	Material 1		Case
▶	2	Material 3		Pallet

- Line:** The Order Line number for the Line - system generated.
- Material:** Specifies the Material Lot for the Order Line. Select from a drop-down list, or click the magnifying glass icon to search for Materials (you can also create a new Material this way).
- Material Name:** The Name of the chosen Material for the Order Line - system generated.
- Packaging:** Select the Packaging Type that the Quantity refers to.

Quantity	Available	Remaining	Status	Vendo	Lot	Shipm	Notes
15.00	1,674.00	1,659.00					
1.00	23.00	22.00					

- Quantity:** Enter the Quantity of the Material for the Order Line.
- Available:** How many of the selected Packaging of this Material are available.
- Remaining:** How many of the selected Packaging of this Material will be available after the Order is fulfilled.
- Status:** The Status of the Order Line (Created, Completed, etc) - system generated.
- Vendor Lot:** Specifies the Vendor Lot for the Order Line.
- Lot:** Specifies the Material Lot for the Order Line.
- Shipment:** The Shipment this Order Line is on - system generated.
- Notes:** An open field for notes or extra information.

**\*Those in red are required fields.**

# Create a New Order

This tutorial will walk you through the process of creating a new Order using the FootPrint Silverlight ePortal.

## Step 1. Add a New Order

1. Click **New Order**.



## Step 2. Fill Out the Order Header

1. Update **Order Number**.
2. Select **Order Class**.
3. Select **Owner**.
4. Select **Project**.
5. (Optional) Select **Carrier**.
6. (Optional) Select **Service Type**.

## Create a New Order

The screenshot shows the 'New Order' form in the FooPrint Warehouse Management System. The form is titled 'Order:24158' and has a 'Save' button. The 'Order Number' field is highlighted with a red box. The form includes fields for 'Order Class', 'Owner', 'Project', 'Carrier', 'Service Type', and 'Status'. There are also fields for 'Account', 'Contact', 'Owner Reference', and 'Vendor Reference', each with a 'Create' button. The 'Last Modified On' and 'Last Modified By' fields are also present. A table at the bottom shows the order lines with columns: Line, Material, MaterialLookupCode, Packaging, Quantity, Available, and Remaining. The first line is labeled '0'.

### 7. Associate an Account.

#### Existing Account

a. Click ...

The screenshot shows the 'New Order' form in the FooPrint Warehouse Management System. The 'Account' field is highlighted with a red box. The form is titled 'Order:24158' and has a 'Save' button. The 'Order Number' field is now 'Portal Test'. The 'Order Class' is 'Purchase Order'. The 'Owner' is 'TemplateOwner'. The 'Project' is 'TemplateOwner'. The 'Carrier' is 'Crane Worldwide'. The 'Service Type' is 'Air Export'. The 'Status' is 'Created'. The 'Account' field is highlighted with a red box. The 'Contact' field has a 'Create' button. The 'Owner Reference' and 'Vendor Reference' fields are empty. The 'Last Modified On' and 'Last Modified By' fields are also present. A table at the bottom shows the order lines with columns: Line, Material, MaterialLookupCode, Packaging, Quantity, Available, and Remaining. The first line is labeled '0'.

b. Click on the applicable line.

c. Click **Select Account**.

## Create a New Order

Lookup Code	Name	Account Type	Notes
Default	Default Account	Vendor	
Ryan	Ryan	Customer	

## New Account

a. Click **Create**.

Line	Material	MaterialLookupCode	Packaging	Quantity	Available	Remaini
0						

b. Enter **Lookup Code**.

c. Enter **Name**.

d. Select **Account Type** from the drop-down.

e. Click **Save**.

Create a New Order

Account Name

Account Lookup Code

Account Type  
Any Account Type

Search Accounts

Cancel Search

Lookup Code	Name	Account Type	Notes
Default	Default Account	Vendor	
Ryan	Ryan	Customer	

Select Account

Close

Completed Loading 2 Accounts

Page 1 of 1

8. Associate a Contact.

Existing Contact

- a. Select a **Contact** from the drop-down.

FootPrint

Warehouse Management System

Orders

Reports

New Order

Orders

Shipments

Inventory

Order:24158

Save

Order Number

Account

Last Modified On

Portal Test

Portal Created Account

Create

Order Class

Contact

Last Modified By

Purchase Order

Owner Reference

Create

Owner

Owner Reference

TemplateOwner

Vendor Reference

Project

Notes

TemplateOwner

Carrier

Grane Worldwide

Service Type

Air Export

Status

Created

Line	Material	MaterialLookupCode	Packaging	Quantity	Available	Remaini
0						

New Contact

## Create a New Order

a. Click **Create**.

Order: 24158

Save

**Order Number**  
Portal Test

**Order Class**  
Purchase Order

**Owner**  
TemplateOwner

**Project**  
TemplateOwner

**Carrier**  
Crane Worldwide

**Service Type**  
Air Export

**Status**  
Created

**Account**  
Portal Created Account

**Contact**  
Create

**Owner Reference**  
Create

**Vendor Reference**

**Last Modified On**

**Last Modified By**

Line	Material	MaterialLookupCode	Packaging	Quantity	Available	Remaining
0						

b. Enter **Lookup Code**.

c. Enter **First Name** and **Last Name**.

d. Enter **Address Line 1**.

e. Enter **City**.

f. Enter **State**.

g. Enter the **Postal Code**.

h. Click **Save**.



**Create Contact for Portal Created Account** [X]

**Lookup Code**

**First Name** **Last Name**

**Attention Of**

**Line 1**

**Line 2**

**City**

**State** **Postal Code** **Country**

Cancel Save

9. (Optional) Enter Owner Reference.
10. (Optional) Enter Vendor Reference.
11. (Optional) Enter Notes.

## Create a New Order

FootPrint Warehouse Management System

Order: 24158

Save

Order Number: Portal Test Account: Portal Created Account Last Modified On: [ ] Create

Order Class: Purchase Order Contact: Portal Test Last Modified By: [ ] Create

Owner: TemplateOwner Owner Reference: [ ]

Project: TemplateOwner Vendor Reference: [ ]

Carrier: Crane Worldwide Notes: [ ]

Service Type: Air Export

Status: Created

Line	Material	MaterialLookupCode	Packaging	Quantity	Available	Remaining
0						

### Step 3. Enter the Order Lines

1. Click **Material** Field to activate the drop-down.
2. Select **Material** from the drop-down.

FootPrint Warehouse Management System

Order: 24158

Save

Order Number: Portal Test Account: Portal Created Account Last Modified On: [ ] Create

Order Class: Purchase Order Contact: Portal Test Last Modified By: [ ] Create

Owner: TemplateOwner Owner Reference: [ ]

Project: TemplateOwner Vendor Reference: [ ]

Carrier: Crane Worldwide Notes: [ ]

Service Type: Air Export

Status: Created

Line	Material	MaterialLookupCode	Packaging	Quantity	Available	Remaining
0						

3. Select **Packaging** from the drop-down.

## Create a New Order

Foo Print Warehouse Management System

Orders Reports

New Order

Orders

Shipments

Inventory

Order: 24162

Save

Order Number: 24162 Account: Portal Created Account Create Last Modified On

Order Class: Purchase Order Contact: Portal Test Create Last Modified By

Owner: TemplateOwner Owner Reference: Portal

Project: TemplateOwner Vendor Reference: Portal

Carrier: Crane Worldwide Notes

Service Type: Air Export

Status: Created

Line	Material	MaterialLookupCode	Packaging	Quantity	Available	Remaining
0	Test 4	Test 4	EA			

### 4. Enter the Quantity.

Foo Print Warehouse Management System

Orders Reports

New Order

Orders

Shipments

Inventory

Order: 24162

Save

Order Number: 24162 Account: Portal Created Account Create Last Modified On

Order Class: Purchase Order Contact: Portal Test Create Last Modified By

Owner: TemplateOwner Owner Reference: Portal

Project: TemplateOwner Vendor Reference: Portal

Carrier: Crane Worldwide Notes

Service Type: Air Export

Status: Created

Line	Material	MaterialLookupCode	Packaging	Quantity	Available	Remaining
0	Test 4	Test 4	EA			

## Step 4. Save the Order

### 1. Click Save.

Create a New Order

Orders

Reports

New Order

Orders

Shipments

Inventory

Order:24162

Save

Order Number

24162

Account

Portal Created Account

Create

Last Modified On

Order Class

Purchase Order

Contact

Portal Test

Create

Last Modified By

Owner

TemplateOwner

Owner Reference

Portal

Project

TemplateOwner

Vendor Reference

Portal

Carrier

Crane.Worldwide

Notes

Service Type

Air Export

Status

Created

Line	Material	MaterialLookupCode	Packaging	Quantity	Available	Remaining
0						
1	Test 4	Test 4	EA	4.00		

# ePortal Orders

## Sections

- [Overview](#)
- [Main Screen Layout](#)
- [Order Filter](#)
- [Order List](#)
- [Order Details](#)

## Overview

The ePortal Orders tab displays a list of all Orders in the system, which can be filtered by entering specific search terms. These Orders can be opened for more detailed information. The user is also able to upload Order requests through this tab.

## Main Screen Layout

Order #	Status	Order Class	Owner Name	Project Name	Account Name	Created By	Created On	Warehouse
77	Completed	Sales Order	Gilgamesh Cooking	Low Quality Goods		DATEXVgillespie	8/9/2013 12:14:31 PM	
79	Processing	Sales Order	Gilgamesh Cooking	Low Quality Goods	Gilgamesh Cooking	DATEXVgillespie	8/9/2013 12:23:39 PM	
80	Completed	Purchase Order	Gilgamesh Cooking	Low Quality Goods		DATEXVgillespie	8/9/2013 1:13:28 PM	
81	Completed	Purchase Order	Gilgamesh Cooking	Low Quality Goods		DATEXVgillespie	8/9/2013 1:25:41 PM	
83	Completed	Purchase Order	Gilgamesh Cooking	Low Quality Goods		DATEXVgillespie	8/9/2013 1:35:13 PM	
84	Processing	Sales Order	Gilgamesh Cooking	Low Quality Goods		DATEXVgillespie	8/12/2013 1:13:03 PM	
85	Processing	Purchase Order	Gilgamesh Cooking	Low Quality Goods		DATEXVgillespie	8/12/2013 3:47:35 PM	
86	Processing	Sales Order	Gilgamesh Cooking	Low Quality Goods		DATEXVgillespie	8/19/2013 9:49:15 AM	

Completed Loading 8 Orders | Page 1 of 1

The Orders tab is divided into two parts:

### 1. Order Filter

Allows the user to search for Orders by the desired terms, and upload new Orders in the form of Excel Worksheets.

## 2. Order List

Displays information about all Orders in the system matching the search terms.

### Order Filter

<b>Owner</b> Gilgamesh Cooking Supplies	<b>Created After</b> 8/1/2013 15
<b>Project</b> Low Quality Goods	<b>Created Before</b> 8/17/2013 15
<b>Order #</b> <input type="text"/>	<b>Owner Ref</b> <input type="text"/>
	<b>Vendor Ref</b> <input type="text"/>

Here the user can enter specific information by which the Orders displayed in the Order List will be filtered, including drop-down lists for the **Owner** (the only information required to be entered) and **Project**, the dates between which the Orders were **Created**, and open fields for the **Order Number**, the **Owner Reference Number** (as entered in the [Order Basic Information](#)), and the **Vendor Reference Number** (entered in the [Order Header tab](#)). Once filter terms are entered, clicking the **Search Orders** button will display all relevant Orders in the Order List.

The **Upload Orders** button allows the user to upload an Excel Worksheet file (97-2003 .xls format) as an Order request, which will be saved to the **OrderImports** folder on the FootPrint server.

## Order List

After searching for Orders, all Orders that match the filter terms will be displayed in the Order List, along with information about those Orders.

### Order Information

Order #	Status	Order Class	Owner Name	Project Name
77	Completed	Sales Order	Gilgamesh Cooking	Low Quality Goods
79	Processing	Sales Order	Gilgamesh Cooking	Low Quality Goods
80	Completed	Purchase Order	Gilgamesh Cooking	Low Quality Goods
81	Completed	Purchase Order	Gilgamesh Cooking	Low Quality Goods

**Order #:** The Order Number for the Order.

**Status:** The current Status of the Order.

**Order Class:** The Order Class the Order has been assigned to.

**Owner Name:** The Name of the Owner for whom the Order was created.

**Project Name:** The Name of the Project under which the Order was created.

Account Name	Created By	Created On	Warehouse
	DATEX\rgillespie	8/9/2013 12:14:31 PM	
Gilgamesh Cooking	DATEX\rgillespie	8/9/2013 12:23:39 PM	
	DATEX\rgillespie	8/9/2013 1:13:28 PM	
	DATEX\rgillespie	8/9/2013 1:25:41 PM	

**Account Name:** The Name of the Account associated with the Order.

**Created By:** The FootPrint User who created the Order.

**Create On:** The Date the Order was Created.

**Warehouse:** The Warehouse to which the Order belongs.

By double-clicking an Order, it will open the Order Details tab for the Order.

## Order Details

Order List

<b>Order #</b>	WT3 Out	<b>Account</b>	WT3 Out
<b>Order Class</b>	Outbound Warehouse Transfer	<b>Owner Reference</b>	
<b>Status</b>	Created	<b>Vendor Reference</b>	
<b>Owner</b>	Gilgamesh Cooking Supplies	<b>Notes</b>	Created for Warehouse Transfer [3]
<b>Project</b>	Low Quality Goods		

Line #	Status	Material	Vendor Lot	Lot	Quantity	UOM	Shipment #	Establishment Id	Residue Hold Id	Notes	Marks
1	Created	FORK	FORK-GLot	FORK-GLot	50.00000000	Box	32				
2	Created	SP00N	SP00N-GLot	SP00N-GLot	50.00000000	Box	32				

The Order Details tab displays basic information about the Order, along with more specific details about each Order Line for the Order.

### Basic Order Information

**Order #:** The Order Number for the Order.

**Order Class:** The Order Class the Order has been assigned to.

<b>Status:</b>	The current Status of the Order.
<b>Owner:</b>	The Name of the Owner for whom the Order was created.
<b>Project:</b>	The Name of the Project under which the Order was created.
<b>Account:</b>	The Name of the Account associated with the Order.
<b>Owner Reference:</b>	The Order's Reference Number.
<b>Vendor Reference:</b>	A Reference Number associated with the Vendor or Consignee Contact.
<b>Notes:</b>	Any notes in the system for the Order.

### Order Line Details

<b>Line #:</b>	The Order Line Number for the Line.
<b>Status:</b>	The current Status of the Order Line.
<b>Material:</b>	The Material LookUp Code ordered for the Line.
<b>Material Name:</b>	The Name of the Material ordered for the Line.
<b>Vendor Lot:</b>	The Vendor Lot for the Materials on the Line.
<b>Lot:</b>	The Lot for the Materials on the Line.
<b>Quantity:</b>	The number of Packages of the Material ordered for the Line.
<b>UOM:</b>	The Packaging Type for the Material on the Line.
<b>Base Available:</b>	The total Quantity of the Material available in the Warehouse.
<b>Pending Base:</b>	The total Material Quantity attached to pending Orders ( <i>not including</i> this current Order).
<b>Remaining Base:</b>	The final Material Quantity after factoring in the pending Orders ( <i>including</i> this current Order).
<b>Shipment #:</b>	The number of the Shipment on which the Materials for the Line are to be delivered.
<b>Notes:</b>	Any notes in the system for the Order Line.
<b>Marks:</b>	Any marks in the system for the Order Line.



# ePortal Shipments

## Sections

- Overview
- Main Screen Layout
- Shipment Filter
- Shipment List
- Shipment Details

## Overview

The ePortal Shipments tab displays a list of all Shipments in the system, which can be filtered by entering specific search terms. These Shipments can be opened for more detailed information.

## Main Screen Layout

The screenshot shows the 'Shipments' tab interface. A red box labeled '1' highlights the 'Shipments Filter' section, which includes fields for Owner, Project, Shipment Status, Shipment #, Created After, Created Before, Shipped After, Shipped Before, Bill Of Lading, Seal Identifier, and Tracking Id. A 'Search' button is also present. A second red box labeled '2' highlights the 'Shipment List' table below the filter.

Type	Shipment #	Tracking Id	Container Lookup	Status	Shipped Date	Carrier	Seal Id	Created Date	Priority
Inbound	1102			Released		UPS		3/21/2016 8:12:01	4
Inbound	1105			Completed	3/21/2016 8:16:37	UPS		3/21/2016 8:12:45	1
Inbound	1107			Completed	3/21/2016 8:17:22			3/21/2016 8:12:46	0
Inbound	1107			Released				3/21/2016 8:17:22	
Inbound	1115			Created				3/21/2016 8:30:14	0
Outbound	1100			Created	3/21/2016 8:02:00	UPS		3/21/2016 8:04:39	0

At the bottom of the interface, it shows 'Total Shipments: 6' and 'Page 1 of 1'.

The Shipments tab is divided into two parts:

### 1. Shipments Filter

Allows the user to search for Shipments by the desired terms.

## 2. Shipments List

Displays information about all Shipments in the system matching the search terms.

### Shipments Filter

<b>Owner</b> Gilgamesh Cooking Supplies	<b>Created After</b> 7/20/2013	<b>Shipped After</b> 8/6/2013
<b>Project</b> Low Quality Goods	<b>Created Before</b> 8/15/2013	<b>Shipped Before</b> 8/19/2013
<b>Shipment Status</b> Completed	<b>Shipment #</b>	<b>Bill Of Lading</b>
	<b>Seal Identifier</b>	<b>Tracking Id</b>

Here the user can enter specific information by which the Shipments displayed in the Shipments List will be filtered, including drop-down lists for the **Owner** (the only information required to be entered), **Project**, and **Shipment Status**, the dates between which the Shipments were **Created** or **Shipped**, and open fields for the **Shipment Number**, the **Bill of Lading Number**, the **Seal ID**, and the **Tracking ID**. Once filter terms are entered, clicking the **Search** button will display all relevant Shipments in the Shipments List.

### Shipments List

After searching for Shipments, all Shipments that match the filter terms will be displayed in the Shipments List, along with information about those Shipments.

#### Shipment Information

Type	Shipment #	Tracking Id	Load Container	Status ▲	Shipped Date	Carrier
Outbound	32			Cancelled		Goofman Expr
Outbound	70			Cancelled		Good Carriers
Outbound	72			Cancelled		
Outbound	74			Cancelled		Good Carriers
Inbound	77			Cancelled		
Outbound	78			Cancelled		

- Type:** The Type of Shipment (Inbound or Outbound).
- Shipment #:** The Shipment Number for the Shipment.
- Tracking ID:** The Tracking ID for the Shipment's Load Container.
- Load Container:** The LookUp Code for the Shipment's Load Container.
- Status:** The current Status of the Shipment.
- Shipped Date:** The date on which the Shipment was Shipped/Closed.
- Carrier:** The Name of the Carrier for the Shipment.

Seal Id	Created Date	Priority	Bill Of Lading	Notes	Carrier Service
	7/25/2013 4:28	0	10000000000000		Ground
	7/25/2013 3:26	0	10000000000000		Air
	7/25/2013 3:36	0	10000000000000		
	7/25/2013 3:55	0	10000000000000		Air
	7/25/2013 4:19				
	7/25/2013 4:19		10000000000000		

**Seal ID:** The Seal ID for the Shipment.

**Create Date:** The Date on which the Shipment was Created.

**Priority:** The Priority assigned to the Shipment.

**Bill of Lading:** The Bill of Lading Number associated with the Shipment.

**Notes:** Any notes in the system for the Shipment.

**Carrier Service:** The Service Type by which the Shipment was made.

By double-clicking a Shipment, it will open the Shipment Details tab for the Shipment.

## Shipment Details

Shipments
Shipment: 68

**Shipment #**  
633

**Shipped Date**  
7/25/2013 3:21:36 PM

**Notes**  
Shipment Closed by [Russell Gillespie], on [7/25/2013 3:21:36 PM]

**Priority**  
2

**Available Date**

**Bill of Lading**  
6541121

**Pickup Date**

**Shipment Code**  
633

**Account**

**Account Contact**

**Seal Id**  
11235

**Shipment Status**  
Completed

Shipment Lines
Orders
License Plates
Attachments

Line #	Status	Expected Quantity	Expected UOM	Actual Quantity	Actual UOM
1	Completed	50.00000000	Box	50.00000000	Box
2	Completed	300.00000000	Box	300.00000000	Box

The Shipment Details tab displays basic information about the Shipment, along with several tabs containing more specific details about the Shipment. These tabs are for each Shipment Line for the Shipment, for all Orders associated with the Shipment, for the License Plates associated with the Shipment, and any file Attachments for the Shipment.

### Basic Shipment Information

<b>Shipment #:</b>	The Shipment Number for Shipment.
<b>Priority:</b>	The Priority assigned to the Shipment.
<b>Bill of Lading:</b>	The Bill of Lading Number associated with the Shipment.
<b>Shipment Code:</b>	The system-generated ID for Shipment.
<b>Account Contact:</b>	The Contact for the Account associated with the Shipment.
<b>Shipment Status:</b>	The current Status of the Shipment.
<b>Shipped Date:</b>	The date on which the Shipment was Shipped/Closed.
<b>Available Date:</b>	The date on which the Shipment is Available.
<b>Pickup Date:</b>	The date on which the Shipment to be picked up.
<b>Account:</b>	The Name of the Account (Sup-Supplier) associated with the Shipment.
<b>Seal ID:</b>	The Seal ID for the Shipment.
<b>Notes:</b>	Any notes in the system for the Shipment.

## Shipment Lines Details

Line #	Status ▲	Material Lookup	Expected UOM	Expected Quantity	Actual Quantity	Actual UOM
1	Completed	Material 1	Case	1.00000000	0.0	Case

<b>Line #:</b>	The Shipment Line Number for the Line.
<b>Status:</b>	The current Status of the Shipment Line.
<b>Material Lookup:</b>	The LookUp Code of the Material on the Shipment Line.
<b>Expected UOM:</b>	The Packaging Type ordered for the Material on the Line.
<b>Expected Quantity:</b>	The number of Packages of the Material ordered for the Line.
<b>Actual Quantity:</b>	The actual number of Packages of the Material shipped for the Line.
<b>Actual UOM:</b>	The actual Packaging Type for the Material shipped.

## Orders Details

Order #	Status	Order Class	Owner Name	Project Name	Account Name	Created By	Created On	Warehouse
813	Completed	Inbound ASN	Gilgamesh Cooking	Low Quality Goods	Grendel's Knives	DATEX\rgillespie	7/25/2013 2:11	

**Order #:** The Order Number for the Order.

**Status:** The current Status of the Order.

**Order Class:** The Order Class the Order has been assigned to.

**Owner Name:** The Name of the Owner for whom the Order was created.

**Project Name:** The Name of the Project under which the Order was created.

**Account Name:** The Name of the Account associated with the Order.

**Created By:** The FootPrint User who created the Order.

**Create On:** The Date the Order was Created.

**Warehouse:** The Warehouse to which the Order belongs.

## License Plates Details

License Plate #	Base Quantity	Net	Gross	Weight UOM
LPSHP-001	500.00000000	10.00000000	10.00000000	Pound
LPSHP-002	50.00000000	50.00000000	60.00000000	Pound
LPSHP-003	750.00000000	10.00000000	10.00000000	Pound

**License Plate #:** The License Plate LookUp Code.


**Base Quantity:** The number of units of inventory on the License Plate.

**Net:** The Net Weight of the License Plate.

**Gross:** The Gross Weight of the License Plate.

**Weight UOM:** The unit by which the Gross and Net Weights are measured.

## Attachments Details

Double-Click To Download Attachment					
Name	Size	Extension	Visibility	Download	Download Status
 CLC logo.png	22 KB	.png	Public	<input type="button" value="Download"/>	Completed.

**Name:** The name of the attached file.

**Size:** The size of the attached file.

**Extension:** The extension of the attached file.

**Visibility:** The privacy level of the file.

**Download:** A download status bar indicating how much of the file has

<b>Download</b>	been downloaded when double-clicked.
<b>Status:</b>	The status of the download when downloading an attachment.

# ePortal Inventory

## Sections


- [Overview](#)
- [Inventory List](#)

## Overview

The ePortal Inventory tab displays a list of all Inventory in the system, filtered by Project.

## Inventory List

Inventory



Owner

Gilgamesh Cooking Supplies

Project

Low Quality Goods

Drag a column header and drop it here to group by that column

Material	Lot	Available	On Hand	Packaging	Description	Warehouse	Vendor Lot
SP00N	SP00N-GLot	11095.00000000	11106.00000000	Box	It's too big	Fort Myers	SP00N-GLot
FORK	FORK-GLot	905.00000000	910.00000000	Box	It's too large to eat with.	Fort Myers	FORK-GLot
PFORKZ	PFORKZ-GLot	1229.00000000	1229.00000000	Box	Bendier than you'd imagine.	Fort Myers	PFORKZ-GLot
PKNIVEZ	PKNIVEZ-GLot	1069.00000000	1069.00000000	Box	Worthless.	Fort Myers	PKNIVEZ-GLot
PSP00NZ	PSP00NZ-GLot	1688.00000000	1688.00000000	Box	Nope.	Fort Myers	PSP00NZ-GLot
PPLATEZ	8	104.00000000	104.00000000	Box	Hand crafted!	Fort Myers	8
PPLATEZ	9	100.00000000	100.00000000	Box	Hand crafted!	Fort Myers	9
PPLATEZ	10	89.00000000	89.00000000	Box	Hand crafted!	Fort Myers	10
PSPORKZ	PSPORKZ-GLot	100.00000000	100.00000000	Box	The original spork.	Fort Myers	PSPORKZ-GLot
PPLATEZ	16	10.00000000	10.00000000	Each	Hand crafted!	Fort Myers	16
PPLATEZ	16	100.00000000	100.00000000	Box	Hand crafted!	Fort Myers	16
INDBLND-001	BLND-001	2.00000000	2.00000000	Each	Mostly just dangerous.	Fort Myers	BLND-001
INDBLND-001	BLND-002	2.00000000	2.00000000	Each	Mostly just dangerous.	Fort Myers	BLND-001

Completed Loading 13 Lots

Once an **Owner** and **Project** are selected from the drop-down lists, all Materials categorized under the chosen Project will be displayed. These Materials are organized by Lot.

<b>Material:</b>	The Material LookUp Code for the Materials.
<b>Lot:</b>	The Lot for the Materials.
<b>Available:</b>	The number of Packages of the Material that are still Available for Shipment.
<b>On Hand:</b>	The total number of Packages of the Material in the Warehouse.
<b>Packaging:</b>	The Packaging Type for the Materials.

**Description:** A description of the Materials.  
**Warehouse:** The Warehouse in which the Materials are located.  
**Vendor Lot:** The Vendor Lot for the Materials.



# ePortal Reports

## Overview

Reports are designed to deliver precise and current information about your Warehouse, and be customized to fit your or your customer's needs.

## Main Screen Layout

The screenshot shows the ePortal Reports interface. On the left, a sidebar (labeled '1') contains the 'Reports' tab, a 'Refresh Reports' button, and a list of reports: 'Cathode Report Tube', 'cDetailedInventoryByOwnerReport', 'Elephant Report', and 'The Elder Report'. The main area (labeled '2') displays the 'Inventory by Pallet' report for 'Cathode Report Tube'. It shows two tables: one for 'Fort DeSoto' and one for 'Fort Myers'. Each table lists pallets, locations, values, and materials with their descriptions, quantities, and units of measure (UOM).

Warehouse:	Fort DeSoto	Owner:	Armada Electronics	Project:	Video Games
Pallet:	THE BUCKET	Location:	THE BUCKET	Value:	180.00
Material Lookup Code	GF-001	Material Description	Fighting game	On Hand	3 Box

Warehouse:	Fort Myers	Owner:	Armada Electronics	Project:	Video Games
Pallet:	LPVIDYA-001	Location:	E1-001	Value:	10,380.00
Material Lookup Code	DC-001	Material Description	RPG	On Hand	46 Box
	GF-001	Material Description	Fighting game	On Hand	40 Box
	PPM-001	Material Description	Action Platformer	On Hand	43 Box
	SPTSDB-001	Material Description	Platformer	On Hand	44 Box

The ePortal screen is divided into two parts that concern Reports:

### 1. Reports List

Clicking the Reports tab on the left side of the screen opens a list of all Reports available to the user. To load the most currently available Reports, click the **Refresh** button.

### Note

Users only have access to Custom Reports for which they have viewing privileges.

## **2. Report Details**

Once a Report from the list is clicked, it will open the in a new tab. Depending on the Report, you may have to enter filter terms to display information.